

Tracking HIPAA Business Transactions

1.1 Introduction

The information in this document provides procedures for the HIPAA Point Person to track their Program's progress for meeting HIPAA Electronic Transactions and Code Sets standards.

It is important for the Information Technology Support Center (ITSC) be able to track each Area's progress for complying with HIPAA Electronic Transactions and Code Sets standards. Through effective tracking, ITSC can monitor IHS's progress as a whole for complying with HIPAA legislation as well as plan for support with internal resources.

1.2 Overview

This document provides the HIPAA Point Person with instructions for adding, updating, deleting, and transmitting transaction test data for sites and facilities within their Program. It also outlines procedures for printing progress reports.

1.3 How do I open the HIPAA Business Transactions Testing Report?

To begin updating a HIPAA Business Transaction Testing Report, locate the HIPAA transaction test spreadsheet on California Area Office website found under Clinical Topics – HIPAA Update - [HIPAA TX Testing Reports for each site - CA](#) and double click on the file for your site. This will open the report in the Microsoft Excel program. A sample of the spreadsheet is shown in Figure 1-1.

Click on the transaction tab at the bottom of the spread sheet to open the business transaction report you wish to modify or print.

1.4 Spreadsheet Fields

It is possible to modify up to eight fields for each transaction. The following are definitions for each of the fields.

TX: This field identifies the type of business transaction data being entered.

Insurer: This field identifies the insurance company/entity the site/facility is testing with. This may also be known as the "Trading

Partner.”

Sites Testing: This field identifies the site/facility that is testing a particular HIPAA business transaction.

Area: This field identifies the Area the site/facility falls within.

Contacts: This field identifies the contact person for the specific type of business transaction for the particular test site.

Testing Date Began: This field identifies when the site began testing the business transaction with a trading partner.

Last Transaction Submitted/Update for Testing: This field identifies the last date a test file was transmitted to a trading partner. This field can also be used for listing issues or concerns.

Testing Date Completed: This field identifies when the site completed testing the business transaction with a trading partner. The “Go Live” date can also be entered in this field.

1.5 How do I add a new site to the HIPAA transactions testing report?

To add a new test site to the HIPAA Transaction Testing Report, select the type of business transaction by using your mouse to click on the transaction tab at the bottom of the spreadsheet page.

1. Scroll down to the first empty row to begin populating the fields with test data.
2. Enter the company (Trading Partner) the site is testing with.
3. Enter the name of the site/facility that is transaction testing.
4. Enter your IHS Area.
5. Enter the name of the person to be contacted at the test site regarding the testing of the electronic business transaction.
6. Enter the date the transaction testing began (if applicable).
7. Enter the date the last transaction file was submitted to the trading partner for testing. Issues/concerns can also be entered in this field.
8. Enter the date the transaction testing was completed (if applicable).

9. Save the file.

1.6 How do I update the site's status of a transaction test?

To update a test site's transaction testing progress, select the type of business transaction by using your mouse to click on the transaction tab at the bottom of the spreadsheet page.

1. Locate the row on the spreadsheet that shows the site data that requires updating.
2. Click on the field you want to update and make the necessary changes in the Excel edit area.
3. Save the file.

1.7 How do I delete a record?

To delete a test site's transaction record, select the type of business transaction by using your mouse to click on the transaction tab at the bottom of the spreadsheet page.

1. Locate the site record that needs to be deleted.
2. Click on the row number of the site. It is located on the far left side of the spreadsheet.
3. Click on Edit on the toolbar.
4. Click on Delete. This will delete the entire row. If you delete a row by accident, click Edit on the tool bar again and then click on the Undo action.
5. Save the file.

1.8 How do I print a HIPAA transactions testing report?

To print a testing report for a specific transaction, select the type of business transaction by using your mouse to click on the transaction tab at the bottom of the spreadsheet page.

Locate the printer icon on the tool bar and click on it. The report will print at the default printer for your computer.

The report should print in a landscape format.

1.9 How do I transmit test report data to ITSC?

Each Wednesday, the Program HIPAA Point Person will transmit their updated transaction test data to ITSC. Again, this is crucial for California Area & ITSC to track IHS' efforts for complying with HIPAA Electronic Transactions and Code Sets standards.

1. After updating the test data, close the file.
2. Insert the updated file into an e-mail message and send it to toni.johnson@mail.ihs.gov.

Each Program's data will then be merged into an Area master report that provides a current overall testing status by Transaction type, test sites and payers for the California Area. The Area master report will then be submitted to ITSC who will merge the data into the national master report.

1.10 Who do I contact if I'm still having problems?

If you incur any problems or questions while using the HIPAA Business Transactions Testing Report spreadsheet, please contact Toni Johnson at (916) 930-3981 Ext. 354. You can also email support@mail.ihs.gov to provide your name, site or facility, phone number and your question.

Indian Health Service - IT SC							
HIPAA Business Transactions Testing Report							
834							
TR	Insurer	Site Testing	AREA	Contacts	Testing Date Range	Last Transaction Submitted/Update for	Testing Date Completed
834	AHCCCA-AZ Medicaid	San Carlos SU	Phoenix	Joe Hattcoat, Phoenix Area, 602-364-5145	AHCCCA values approved with BPO	Revised 03/14/10 for San Carlos BPO. Call is in the development. Testing projected to begin 03/20/10	
	Wyoming Medicaid	TBD	Billings	7184	Status unknown	NA	
	Indiana Medicaid	TBD	Billings	7184	Status unknown	NA	
	Alaska Medicaid	TBD if applicable	Alaska	2382	Status unknown		
	Oklahoma Medicaid	TBD	Oklahoma	Mary Beaver, Oklahoma Area	Status unknown		

Figure 1-1: Sample HIPAA Business Transactions Testing Report